

**CLASS TITLE:**

**TAX SECTION CHIEF (TAXATION)**

**Class Code:** 02687500

**Pay Grade:** 42A

**EO Code:** A

**CLASS DEFINITION:**

**GENERAL STATEMENT OF DUTIES:** Within the Department of Revenue (DOR) Division of Taxation, to plan, organize, coordinate and direct the work of a large staff engaged in (i) assessing/reviewing, (ii) auditing/investigating, or (iii) processing and operationalizing the administration of taxes under the jurisdiction of the Division of Taxation including managing and overseeing the performance of such functions; to coordinate, direct, and oversee the work of the assigned functional unit; to monitor metrics-based functions and performance; to develop strategic opportunities for improvement consistent with the Division of Taxation's mission; and to do related work as required.

**SUPERVISION RECEIVED:** Works under the general direction of a superior from whom assignments are received in broad outline form; work is reviewed through consultation with a superior concerning objectives, results obtained and conformance with provisions of law and rules, established policies and regulations.

**SUPERVISION EXERCISED:** Plans, organizes, coordinates, and directs the work of a professional, technical, and clerical staff.

**ILLUSTRATIVE EXAMPLES OF WORK PERFORMED:**

Within the Department of Revenue (DOR) Division of Taxation, to plan, organize, coordinate and direct the work of a large staff engaged in (i) assessing/reviewing, (ii) auditing/investigating, or (iii) processing and operationalizing the administration of taxes under the jurisdiction of the Division of Taxation including managing and overseeing the performance of such functions.

To coordinate, direct, and oversee the work of the assigned functional unit.

To monitor metrics-based functions and performance.

To develop strategic opportunities for improvement consistent with the Division of Taxation's mission.

To prepare special reports containing specific data and analysis regarding the production and performance of respective functions and make strategic recommendations regarding future compliance enhancements consistent with the Division's mission.

To coordinate and facilitate training programs to maximize employee competence in the specific unit and to be responsible for the development of formal and informal training for new and current employees.

To stay informed of technical and marketplace policy developments and advise the Tax Administrator on policy, enforcement, and/or operational improvements.

**Within the Assessment and Review unit:**

To plan, organize, coordinate, direct, and review the work of a staff engaged in the assessment and review of specific taxes under the jurisdiction of the Division of Taxation. Such includes but is not limited to Personal Income Tax, Business Corporation Tax, Sales and Use Tax and other Excise Taxes, Estate Taxes, and any licensing or enforcement related to such taxes.

To conduct informal preliminary interviews and conferences with taxpayers and/or their representatives to clarify and/or address matters regarding tax liabilities.

To assist in the development of policies, rules, and regulations necessary for the enforcement of the various provisions of state tax administration and law which require assessment and review.

To do related work as required.

**Within the Audit and Investigations unit:**

To assign, plan, coordinate, and direct the work of a professional and clerical staff performing comprehensive audits of accounting and financial records related to taxes administered by the Division of Taxation. Such audits may include audits performed in the field, as desk audits, and/or internal audits related to technical compliance with state and/or federal mandates.

To plan, organize, coordinate, and review the special field and office investigations of any assigned tax matters resulting from complaints of alleged tax evasion, avoidance, or fraud, especially with respect to the state's excise tax statutory and regulatory mandates.

To manage and oversee the inspections of cigarette and other tobacco product distributors, dealers, wholesalers, manufacturers, and others subject to the state's excise tax laws and enforcement of such laws.

To do related work as required.

**Within the Operations unit:**

To be responsible for the processing, review, approval, and maintenance of the registration of taxpayers for various taxes administered by the Division of Taxation.

To be responsible for the processing of physical and electronic tax documents from the initial receipt by electronic filing, mail, or in-person to the recording of the relevant data in the appropriate files.

To be responsible for the timely processing of remittances by cash, check, and electronic payment methods.

To be responsible for the maintenance, functionality, and processing of the data involved in large tax systems such as Personal Income Tax, employers' Withholding Tax, Estate Tax, Sale and Use Taxes, Business Corporation Tax, employment taxes, alcoholic beverage taxes, and other taxes and fees administered by the Division of Taxation.

To be responsible for the administration of compliance programs, efforts related to bankruptcy and receivership actions, and collections matters for the Division of Taxation.

To review the processing systems and make recommendations for increasing their efficiency and effectiveness.

To be responsible for taxpayer experience and services to provide assistance, insight, understanding, and resolution options for taxpayers in relation to taxes administered by the Division of Taxation.

To be responsible for the protection, production, aggregation, and dissemination of data and analytic byproducts as created, maintained, and used by the Division of Taxation.

To coordinate the tax processing services with other tax functions and with appropriate state and private agencies.

To supervise the mail, information, and intake functions.

To do related work as required.

**REQUIRED QUALIFICATIONS FOR APPOINTMENT:**

**KNOWLEDGE, SKILLS AND CAPACITIES:** A thorough knowledge of the provisions of the state tax laws and policies, rules and regulations utilized in their administration, and the ability to apply such knowledge in the supervision of various tax assessment and review, audit and investigations, operational/processing systems; knowledge of complex statistical methods and techniques; the ability to prepare clear and concise reports containing findings, analyses, conclusions, and recommendations; advanced knowledge of Windows Operating Systems, usage of a personal computer (PC) and standard desktop office tools; knowledge of the principles, practices and techniques of accounting and the ability to apply such knowledge in the supervision and coordination of the accounting for the receipt and disbursement of funds in accordance with state laws and regulations; the ability to prepare reports detailing progress and recommendations for system improvement; the ability to establish and maintain effective working relationships with a variety of staff and officials; and related capacities and abilities.

## **EDUCATION AND EXPERIENCE:**

Education: Possession of a Bachelor's degree from a college of recognized standing in Accounting or a closely related financial field; and

Experience: A minimum of seven (7) years of employment in a highly responsible supervisory position specializing in tax administration.

Or, Possession of a Master's degree from a college of recognized standing in Accounting or a closely related financial field and a minimum of five (5) years of employment in a highly responsible supervisory position specializing in tax administration.

Class Revised: November 19, 2000

Editorial Review: March 15, 2003

Class Revised: November 21, 2021